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ABSTRACT

The results of a year-long involvement in providing tailored professional development experiences for linking agents in the Northwest Reading Consortium is presented. This report is divided into five sections. A brief description of the collaboration between the Consortium and the Northwest Regional Education Laboratory is presented in the first section. Section two contains a discussion on the perspective of the Laboratory on the concepts of dissemination, change, and the role of the linking agent. The third section focuses on the Laboratory's perspective on training linking agents. Guidelines for tailoring materials for training linking agents are set forth in the fourth section. A comprehensive summary of the collaborative experience is offered in the final section. (LH)

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Guidelines for Developing Tailored Professional Development Experiences for Linking Agents

A Collaborative Effort with the Northwest Reading Consortium

by
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Revised
July 1978

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CONTENTS

		Page
OVERVIEW		1
SECTION 1:	Background: The Northwest Reading Consortium Project	3
SECTION 2:	Background Perspective on Dissemination, Change and Linkage	7
SECTION 3:	Background Perspective on Linker Training	17
SECTION 4:	Tailoring Training Materials for Linkers	33
SECTION 5:	Summary of Guidelines	51
APPENDICES		
Appendix A:	Dissemination Definition	57
Appendix B:	Skills List for Linkers	59
Appendix C:	Examples of Notes	67
Appendix D:	Critical Events of Project	69
Appendix E:	Collection of Design Outlines and Materials Lists	71

OVERVIEW

This report is one of the deliverables to NIE by the Dissemination Training staff who provide training and consultation to the Northwest Reading Consortium. (See Dissemination Training Project, RAMP, April 1977 as modified, Activity One.)

The purpose of this report is to share the results of our experiences over the past year in providing tailored professional development experiences for linkers, specifically, some guidelines for tailoring training materials. Audiences for the report might include those in linking roles, those providing professional development or training experiences for linkers, managers of linker projects such as RDUC's and state capacity building efforts, those concerned with developing linkage networks and the National Institute of Education which funded this effort.

The report is divided into five sections and several appendices. Section 1 provides a brief description of the Norhtwest Reading Consortium and our relationship to it. Section 2 presents our perspective on dissemination, change and linkage. Section 3 focuses on our linker training perspective. In Section 4 we give some guidelines for tailoring materials for linkers. Section 5 is a summary.

In the fourth section (guidelines for tailoring) we will focus on issues in designing relatively structured events in which persons in linkage roles are brought together (with or without persons in other kinds of roles being present) and provided with a set of experiences which support the development, conceptualization, sharing and expansion of linkage practices. We do not intend to imply that such

events are "all there is" to linker training or professional development, nor that they are the most important or effective of all possible mechanisms. Instead, our task here will be to describe what we have learned about designing and conducting such events using tailored materials.

SECTION 1
BACKGROUND: THE NORTHWEST READING CONSORTIUM PROJECT

The Northwest Reading Consortium (NRC) is a four-state effort "To improve reading instruction in local education agencies through increased knowledge and use of research and development outcomes." The project makes use of Right to Read planning and assessment procedures, together with materials and strategies emerging from research and development efforts, to bring about reading program improvements in each of the (initially 32) participating schools. As one of seven NIE-funded Research and Development Utilization projects in the nation, the NRC employs "linkers"--one person in each of the four states--who work with local school districts, usually at the building level. These linkers provide the services necessary to "link" problem solving efforts at the local level to resources beyond the district. In this project the linkers are reading specialists hired by the project and housed in intermediate agencies or their equivalent. As initially conceived, key linking functions included serving as a resource for needs assessment, retrieval of R&D outcomes, facilitating the problem solving/decision making process, and facilitating the implementation and utilization of selected R&D outcomes and products. In addition, linkers are asked to furnish information which project management will "feed forward" to regional and national agencies. This information includes: (1) assessments of the utility of the locally selected R&D outcomes and (2) locally perceived needs which a national or regional R&D agenda might address. Finally, linkers are asked to contribute to the documentation and evaluation of the project. Thus linkers are expected not only to provide or retrieve expert knowledge which will support reading

program improvement and to facilitate and occasionally direct portions of a systematic organizational change effort, but also to collect and synthesize data about what the project is doing, to whom (including their own roles), when and to what effect.

Linkers, thus, must simultaneously operate from three very different perspectives:

a) a content focused curriculum development perspective

b) a process focused planned change, organizational development perspective

c) an external observer-evaluator perspective

We of the Dissemination Training Program at NWREL were provided funds by NIE to carry out "tailored consultation and training" to the NRC linkers. Training had not been a part of the original project, and there were no funds within the project to support it. However, as the project itself has evolved and our own relationship to it become collaboratively integrated into both its operational and conceptual structure, additional funds for training have been allocated by the project through its subcontract with NWREL.

(The primary mission of this subcontract has been to establish and maintain a knowledge base and to provide technical assistance to requesting school districts in the project. See Figure 1.)

DIAGRAM OF RELATIONSHIP AMONG CONTRACTS

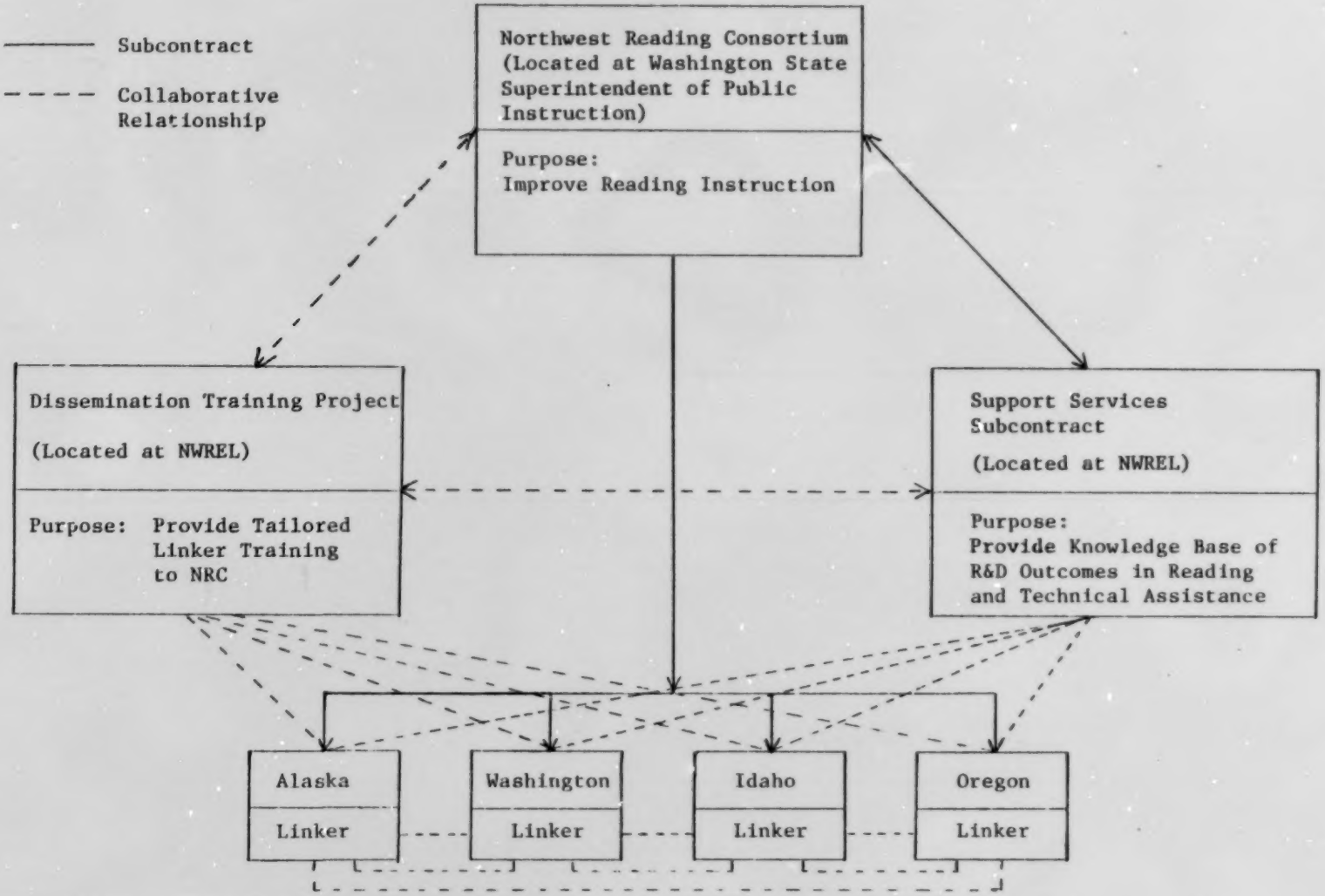

Figure 1

SECTION 2
BACKGROUND PERSPECTIVE ON DISSEMINATION, CHANGE AND LINKAGE

In this section we shall discuss some of the connections among three key concepts: dissemination, change and linkage. In particular, we shall discuss our belief that, if the intended outcome of dissemination is the utilization of what is disseminated, then dissemination inevitably involves change. The role and associated skills of a linker as part of one operational model of the dissemination/knowledge utilization change process will be discussed.

Dissemination and Change

Dissemination in education consists of sets of processes requiring the transformation and utilization of knowledge across boundaries of loosely coupled, socio-political systems for the purpose of creating and supporting educational improvement.[1]

We believe that the ultimate intended outcome of any dissemination effort is to bring about educational improvement through the spread and utilization of new knowledge. In this context, the utilization of new knowledge is broadly defined to include conceptual understandings, materials and products, values and attitudes, behavioral skills, role relationships, and organizational structures whose utility has been demonstrated through some process of systematic inquiry. In local school districts, intermediate agencies and state departments of education, utilization of new knowledge implies some change in the individual or group. The nature and amount of change may be relatively minor, such as learning a new set of "facts" which alter a conclusion previously held. Often, however, the change is more complex, as when utilizing knowledge about employing teaching aides as part of individualizing children's reading programs, for example. In such a situation new role relation-

[1]This definition has evolved out of the conceptual efforts of the Dissemination Program at NWREL. (See Appendix A)

ships have to be developed; new skills have to be learned by principal, teacher, aide and student; and in some cases the teacher's concept of self as teacher will need to be modified. Hence, we believe that dissemination effort must take into account what research tells us about knowledge utilization and change.

A recent summary of findings across five studies of dissemination efforts[2] supports this knowledge utilization/change perspective and concludes that:

- Information alone will not likely effect much change-oriented utilization

Simply getting information and resources out into the hands of local school professionals-- whether through ERIC, marketing or federally funded efforts--does not appear to result in much lasting change, unless accompanied by a facilitator, linker or other change agent. The summary also states that:

- Some in-person intervention is needed, along with good materials
- Classical "marketing" and "RDDU" dissemination models appear unsupported
- A "social process" dissemination/change model appears to be supported

We take results of these studies as strong support for the idea that some type of linkage model of dissemination is necessary.

From our own work in providing tailored training and consultation to the NRC linkers, it appears that the R&D utilization projects established by NIE could contribute substantially to our knowledge about linkage-based dissemination efforts. Again from the Emrick and Peterson synthesis, it appears that linkers functioning within such a model need to engage in at least four essential processes: (1) provide personal

[2] Emrick and Peterson, A Synthesis of Findings Across Five Recent Studies of Educational Dissemination and Change, November 1977.

contact, encouragement and support during all phases of the process; (2) assist with the boundary crossing problems of knowledge utilization, such as locating, transforming, reinterpreting, and adapting materials and ideas to conditions at the local site; (3) be able to deal effectively with the interpersonal and organizational processes at the building and district levels (and, by implication, with conflict and resistance to change); and (4) help provide an incentive or reward structure for knowledge utilization efforts.

Finally, in this introductory statement on dissemination we take the results from the Emrick and Peterson synthesis to support the contention that effective models of dissemination must be grounded in an adequate understanding of the social processes and conditions under which social systems like local school districts utilize knowledge to improve current practice and change.

These understandings must embody two perspectives: those of disseminating agencies and those of local school systems. Therefore, we have argued above that disseminating agencies and their agents (linkers) must employ dissemination strategies which take into account the socio-organizational dynamics of schools. At the same time, from a local school system perspective, the activities of the linker need to be seen as assisting the school to develop and maintain a capacity to accommodate and to adapt more effectively to change.

Thus, there are moral, political and rational grounds for supporting a definition of dissemination as those processes which lead ultimately to the utilization of knowledge, i.e., its implementation and assimilation into the ongoing functioning of the educational system.

The Linker Role and Implications for Linker Skills

In this section we shall discuss some of the key characteristics of the linker role as it is emerging in the Northwest Reading Consortium Project and, based on this discussion, offer some guidelines for achieving linker training goals.

Characteristics of the Linker Role

A linker in this project is an agent external to a local school district. All four linkers are housed in intermediate education agencies or comparable regional centers.

A linker enters into a relatively long-term relationship with a school district, with major effort commonly at the building level, for the purpose of strengthening or improving the reading program. The project recognizes that knowledge utilization for program improvement in schools must be seen as a long-term change process based upon a mutual commitment of district and project (linker) to common goals.

A linker is a change facilitating agent. Consequently, it has been critical that the linker operate from some clearly defined, process oriented model of educational change. Beginning with the problem solving/knowledge utilization process underlying the Right to Read model,[3] the project has developed a set of milestones keyed to significant achievements in the process to document the linker's and the district's efforts.

A linker has access to five significant support functions provided by the project. One is management support, including budgeting, coordination legitimation, and problem solving. A second is a knowledge base

[3]Each of the states involved in the Northwest Reading Consortium has a similar planning model for its Right to Read program. The Washington document is used in Appendix B.

of validated reading programs and technical assistance in their implementation. A third is training support, including formal training session and individualized consultation. A fourth is peer support, including mutual sharing, problem solving and emotional support. The fifth component is evaluation support, including assistance with documentation and formative level feedback.

A linker has available for each district modest dollar resources which can be used for start-up implementation costs or to cover teacher release time for planning or for staff development. Initially, a hiring requirement for linkers was that they have expertise in reading and curriculum improvement. At this point in the project's development the importance of content expertise as an entry requirement for the role is being questioned. The need for content knowledge is not at issue, but several linkers have stated that a more generalist orientation to the role, with an emphasis on change skills and interpersonal relationships, is preferable as an entry requirement.

Northwest Reading Consortium project has certain structures which help define, guide or constrain the linker role. First, linkers have positions at the boundary of at least three distinctly different type educational organizations which have only loosely overlapping goals. As full time staff of NRC (itself located within a state department of education), they assume responsibility for fulfilling the multiple functions this project has defined for the linker role. In addition, the linkers operate from an intermediate agency (or its equivalent), where they work with a project budget and use staff through an NRC subcontract with the intermediate agency. The intermediate agencies are legally responsible for the linkers' work, and the

linker is formally accountable to the agency administration rather than to project management. Finally, each works with six or ten buildings within two local school districts on a locally defined reading instruction problem

As a result, linkers carry out their tasks in an environment which may involve conflicting expectations, and they often experience multiple loyalties and a degree of "apartness" from colleagues. They may also be temporary members of many other groups, such as local task forces, district curriculum committees, higher education staffs, regional research and development labs and centers, and so forth, for such purposes as retrieval, information sharing and training. Consequently, they are likely to face conflicting expectations. If linkers can enter, negotiate, contribute to, maintain and terminate these multiple interpersonal relationships effectively, they will be able to create one of the critical sets of conditions necessary for linkage to occur.

Second, linkers will often act as intermediaries moving between client systems and project resources or external resource systems such as program developers, consultants and technical assisters, higher education, etc. Most client systems, at least initially, won't know how to make use of the linker or the resource systems. Most resource systems won't know how to relate to client systems through the new linker role. Effective enactment of these unique boundary functions--assistance with knowledge transformation, face-to-face communication, reinforcement, and validation of the content of print and other materials, and followup assistance and implementation support--provide a second critical aspect of linkage.

Third, one can anticipate some confusion about adequate problem

definition at the local level. Improvement of reading instruction requires not only adequate conceptualization of the curricular and instructional needs experienced by students and teachers, but also adequate conceptualization of needs in the areas of organizational planning, problem solving, decision making and implementation for curricular improvement, and the planning and management of individual, group and organizational change.

Fourth, as we think about resource linkage and knowledge utilization, we feel it is important to view schools as social systems. This means taking the view that schools are more than a collection of individuals carrying out instruction. It means recognizing the importance of people's view of their roles and attending to the ways they come together to carry out work toward common goals (Lieberman takes a similar perspective, 1977). It also means recognizing that schools and their support agencies or resource systems are loosely coupled. In such relationships the focus and extent of commitment, responsibility and control are not clearly specified. Hence, conflicting values and interests are often carried submerged rather than being confronted and negotiated. This means that the ways in which choices are made may not be entirely collaborative, and linkers need to consider employing strategies that don't require a completely collaborative climate, such as bargaining and negotiating, compromise, political support generation, avoidance and accommodation strategies. (See Crandall's paper, 1977, p. 260; Groth, Lohman, Butman and Milczarek's Conflict training materials at NWREL.)

Implications for Linker Skills

As a result of our interactions with the linkers and NRC staff,

our reviews of conceptual and research papers being developed by various Dissemination initiatives of NIE, as well as our own review of the literature on dissemination and change in educational settings, we have categorized linker skills into nine major clusters, which we believe to be salient in terms of the goals of the NRC effort.[4] The list which follows, and the list found in Appendix B which links these skills to phases of the linkage process, are not meant to be prescriptive or complete. Rather, they are meant to indicate the range from which specific training programs might be selected depending on need.

A. To enter, maintain and conclude relatively long-term but temporary helping relationships with clients:

- Explain their role to clients and build credibility and legitimacy
- Enter client system at multiple levels and establish a contract that defines the working relationship between linker and client(s)
- Diagnose the level of organizational readiness for change, including identifying organizational barriers and constraints and identifying the organizational power and decision making structures
- Assess their own resources, styles, values and skills in light of client needs, and negotiate a mutually satisfactory relationship
- Continually redefine their relationship to the client system, as the project develops and/or changes phase, and as the client system itself develops and changes over time

B. In interpersonal communication:

- Communicate clearly, openly and authentically with clients to explain role, build rapport, convey knowledge and maintain personal and project integrity
- Build and maintain open communication channels to relevant actors in client, linkage and support systems

[4] See Arends and Arends, Concepts Which Guide the Linkage Training Service, Northwest Regional Educational Laboratory, Portland, Oregon, 1977.

- Diagnose and cope with communication breakdowns, including conflict, expression of strong feelings and distortions

C. Skills and understanding to facilitate problem solving on the part of clients:

- Develop diagnostic and process helping skills so that an increased repertoire of interventions is available and matched appropriately to the type of problem encountered (e.g., technical, rational and value)

- Participate in and facilitate continuous system diagnoses and identification of problems through needs assessments, monitoring and evaluation efforts that involve people with different perspectives (e.g., teachers, administrators, parents, students)

- Participate in and facilitate problem solving and mutual respect through improving communications, conflict utilization group process and effective leadership/membership skills

- Participate in and facilitate efforts to adopt, create, design or adapt solutions that meet local needs and make use of local potential

D. To retrieve resources needed by clients:

- Diagnose information and resource needs of clients that cannot be met with internal system resources

- Become aware of available R&D outcomes and sources of technical assistance

- Use systematic procedures and established channels (e.g., ERIC, EPIE, SMERC) to bring resources to clients

E. To plan effectively in educational settings:

- Formulate objectives and action steps, analyze resource needs and establish budgets, timelines and evaluation plans

- Implement the planning process in the context of organizational functioning and group process

F. To manage, create or support innovative settings:

- Increase understanding of schools as social and political systems and of the nature of educational change

- Participate in and facilitate meetings that are effective because they are timely and keyed to participants' concerns

- Design and facilitate training for school staffs that is keyed to local implementation needs

- Assist with local materials development to repackage existing products and create new ones

G. To expand content/subject matter knowledge:

- Increase knowledge of major issues in fields of specialization
- Keep abreast of current developments in the field including knowledge about new resources, materials and directives
- Integrate content and process concerns into effective, humanistic programs in educational settings

H. To document and evaluate dissemination and change efforts:

- Develop skills and knowledge to participate in formative and summative evaluation of ongoing change efforts in which one is an active participant
- Locate and secure evaluation assistance as needed
- Carry out evaluation role while not jeopardizing other aspects of the linker role

I. To maintain the linker role:

- Inform resource systems of clients' needs and help resource systems predict future needs of clients
- Facilitate ongoing and systematic assessment of the responsiveness, service capabilities, dissemination and diffusion capabilities of resource systems
- Build support systems with other linkers to enhance professional growth
- Continuously assess and inform key authorities in client, resource and host agencies of plans, progress and impact of linkage upon all concerned
- Cope with the inherent stress, ambiguity and conflicting expectations of the linker role

SECTION 3
BACKGROUND PERSPECTIVE ON LINKER TRAINING

In this section we address ourselves to three issues. First, what do we mean by "training"? Second, what assumptions do we make about how human beings and human systems change, i.e., learn, grow and develop? Third, what process or approach do we take?

Training

We use "training" to cover a broad set of outcomes and processes. To the extent that "training" connotes a more restrictive meaning than we attribute to it, another term such as "professional development" or "professional socialization" could be substituted. For us, "training" covers three broad approaches.

Convergent. The first approach involves fitting people to a technology and leads to "convergence." For example, a group might be trained in one approach to problem solving, such as RUPS[5] or EIC[6] or R2R[7], in which a specific sequence of problem solving steps or activities is modeled by an "expert." As a result, if at the end of successful training you asked trainees to approach and attempt to solve a problem, you would expect their behavior to be more alike than different and to resemble closely the approach modeled by the expert.

Developmental. A second approach to training builds upon the person's own unique approach to his or her role and leads to legitimizing individual differences and providing opportunities to "develop" in line

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[5] Research Utilizing Problem Solving, Commercial-Educational Distributing Services, 8116 S.W. Nimbus, Beaverton, Oregon.

[6] Educational Information Consultant Instructional System, Independent Study, University of California at Berkeley, Berkeley, California 94720.

[7] Right to Read Assessment and Planning Handbook (State of Washington), Superintendent of Public Instruction, Olympia, Washington, July 1975.

with one's own potential. For example, a group of people trained in this problem solving approach might be introduced to RUPS, EIC or R2R and then encouraged to examine other models and adapt one to fit their unique style. Trainees would also be encouraged to develop flexibility in approach to increase their effectiveness in a wide variety of different situations.

Organizational. A third approach to training focuses upon the social-organizational environment in which certain types of behavior are expected to occur. In this approach, the trainer(s) attempts to create organizational conditions which support, nurture and increase the likelihood that the desired behavior will continue to be exhibited. Thus, a group of people trained in this problem solving approach would examine the social norms and values which affect problem solving efforts within the organization, the interpersonal processes which contribute to or detract from such efforts, and the reward structures for engaging in such behavior. They might consider whether they were organized properly for effective problem solving and whether there existed adequate resources and time. In this approach the focus moves from the individual to the individual in relationship to the social system. The outcomes here involve system or organization development as well as individual development.

We believe the three approaches can be used in complementary ways to increase the impact of training. We also believe that any training in linkage skills that neglects the uniqueness of the individual or the social-organizational environment under which those behaviors and skills are to be employed is doomed to producing ineffective, sterile and mechanical performance in the backhome setting.

Assumptions About Change

The essence of any conceptual model for the training of dissemination agents rests on the underlying assumptions one makes about change processes in human systems. Bennis, Benne, and Chin[8] identify three genotypic perspectives which have been used throughout human history to bring about deliberate, intended changes in human systems. All involve the conscious utilization of knowledge and technology, either about things or about human systems.

A. The empirical-rational approach assumes that the motivational force for change lies in rational assessment of relative costs and benefits. Once the client system is cognizant of a positive (benefits outweigh costs) relationship between self-interest (goals, needs) and the knowledge or technology being introduced by a change agent, the system will pursue that knowledge or technology. Models based on cost-benefit assumptions, such as "economic man" or rational problem solving, are typical of this approach, as are the practices of modern advertising, salesmanship, management by objectives and PPBS strategies. The change agent's major task in this approach is to learn about and make clients aware of new knowledge and/or technology. This task includes showing the beneficial relationship of this knowledge/technology to needs and objectives of the target audiences and its cost advantages over the status quo. Secondarily, the change agent may also assist the client in such rational activities as needs assessment and systems analysis to support the client's cost-benefit analysis. The RDD&U model follows this approach.

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[8] Chin, R. and K. Benne, "General Strategies for Effecting Change in Human Systems," in The Planning of Change, Second Edition, Bennis, Benne, and Chin (Eds.), New York: Holt, Rinehart and Winston, Inc., 1969.

B. The political approach assumes that the motivational force for change resides in the control exerted by legitimate authority, administrative policy or coercive power. While the rhetoric of this approach may be couched in rational terms, the underlying issues are: (1) the maintenance or redress of existing power balances among subgroups having different vested interests and values, and/or (2) the marshalling of the support of existing power bases to legitimize, by fiat or by political process, the change advocated.

Where the issue is of the first type, the strategies and functions of the change agent tend to take one or more of the following forms: enfranchisement, social or political movement development, civil disobedience or revolution, on one side; and police and judicial enforcement, legislative or administrative mandate, cooptation, policy formulation, etc., on the other.

Where the issue is marshalling support and legitimation, the change agent is both an advocate and a catalyst, supporting the client's negotiation with the political structure to ensure that significant opinion blocs and authority holders are supportive of the change effort.

C. The normative re-education approach assumes that human actions are motivated not only by rationality and power, but also by complex patterns of interpersonal and organizational commitments and socio-cultural expectations and values. Hence, motives for change or resistance to changes are connected to these cultural and socio-psychological realities, as well as to the more obvious cost benefit relationships. The analysis and summary of findings from research and dissemination projects by Emrick and Peterson clearly support the need to consider this approach as fundamental.

Components of this approach include emphasizing (1) that the client system must be active in solving the problem; (2) that the problem's solution may involve changes in values, norms, attitudes or role relationships within the client system; (3) that the consultant must work collaboratively with the client in diagnosing and solving the problem; (4) that nonconscious elements which impede resolution must be made conscious and examined; and (5) that the methods and concepts of the social sciences are tools to be employed by client and consultant in problem solving.

Our approach is eclectic and encompasses critical elements from all three of the above. Given our definition of dissemination, with its emphasis upon knowledge utilization across boundaries of loosely coupled socio-political organizations, strategies subsumed under both the empirical-rational and political power approach are important functional adjuncts to a normative re-education approach. Self-interest clarification, recognition of and responsiveness to pluralism among system subgroups or needs, and the rational assessment of potential new practices or information are essential aspects of the change process. Similarly, diagnosis of formal and informal organizational structures (power, authority, communication, sociometrics, etc.), development of strategies to gain support (or at least avoid resistance by key linchpins in the system), and attention to policy issues and power centers are vital elements in assisting an adopting system to make the most of potential innovations.

Our Macro-Process Approach to Training

The macro-process approach that we have taken to providing linker training can best be termed emergent, developmental, negotiative and

evolutionary with a strong diagnostic foundation. That is, rather than establishing a priori a role definition and a set and level of skills for the content of a training program for linkers,[9] we have recognized at the outset that successfully designed and implemented tailored training requires negotiating the set of needs to be addressed, the expected outcomes and the training approaches to be employed with several interrelated sets of actors.[10] These sets of actors include (1) project management, with NIE as a major influencer; (2) the linkers, with their participating school districts as major influencers; and (3) ourselves, the trainers, with NIE and the professional literature on education change and dissemination as major influencers. In addition, each set of major actors is housed in an agency or organization which may provide support or constrain certain efforts. State departments of education, intermediate agencies and R&D laboratories and centers are typically involved in this project. There are other actors as well which enter in from time to time.

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[9] There have been many attempts to define the range of roles linkers might play and to develop comprehensive lists of linker skill and knowledge needs. (See, for example, Arends and Arends, 1977; Crandall, 1977; Lohman and Butman, 1977; Rosenau, 1977.) Analyzing the scope of potential linker activities and from it deriving a position statement on what a linker "should" be is useful in alerting managers of linkers and planners of linkage systems to aspects of the role they need to consider in writing job descriptions, selecting personnel and establishing policy and organizational structures. The fact remains, however, that once a linkage system or project is underway, linkers "are" and their role emerges from the interplay of various forces in the situations in which they live and work.

[10] One of the impacts of the trainers on this project is that the approach to organizational improvement which they use and model has been instructive to the other actors. Hence, the trainers have served as a catalyst in this developmental, negotiative process and their behavioral and conceptual orientations are being internalized by the other actors and used by them to guide their own efforts with the project.

We have found that there are at least six dimensions that these actors must address, both in initial negotiations and periodically throughout the duration of the relationship. These form the framework for the joint effort of these actors as it relates to the training and development of staff. These dimensions are:

1. The project goals
2. The dissemination process model to be used
3. The conception of the linking agent role
4. The nature of what is to be disseminated (In this case R&D outcomes)
5. The relationship with the educational agencies serving as clients, the nature of their organizations and where these client organizations are in their own problem solving processes
6. The relationship among the central actors (management, linkers, trainers)

In a developmental or evolutional approach, agreements reached in each area are continually subject to reexamination in the light of additional experience; changes in goals of clients, funders or actors; and new knowledge and ideas from the field. We will illustrate how this approach has operated in this project in the remaining part of this section.

Our entry into a training relationship with the NRC began with management concern for implementing that portion of their contract which called for training of linkers in problem solving and community involvement skills specifically referenced to training materials developed by Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory. The first training event in the fall of 1976 was funded out of the NRC contract, since NIE negotiations with NWREL for the Dissemination Training Program was not completed until after March 1977. As we began planning for the first training event, several forces

were already at work to modify the direction and intent of the training relationship from the original NRC proposal. On the one hand, management had two concerns. They wanted to provide support to linkers in using the management information system being developed and to respond to linker needs and concerns, chief among these were needs, identified by the trainers, for linkers to have clarification of the project's expectation of their role and relationship with local schools. These needs clearly indicated that the replication of packaged training called for in the original proposal was untenable. In addition, a desire was expressed for the NWREL to undertake the work of producing modules (small intact subunits of existing training materials) from the various training packages which could be used in combinations different from those in the packaged sequences as designed and published.

The resulting design for December 13-17, 1976, negotiated by NWREL staff with the linkers and management of the NRC, included a series of experiences and activities designed as modules from existing Improving Teaching Competencies Program materials and tailored to respond to the needs identified by linkers and management.

Subsequently, NIE concluded an agreement with NWREL which included a component to provide tailored training and consultation to the NRC and which established a long-term relationship between the trainers and the NRC.

A key element in the project has been its process model for knowledge utilization. Any dissemination effort requires a process oriented model of the linker role which lays a foundation for developing role expectations, a language for describing and defining key events and activities and mechanisms for tracking linker performance. Establishing some

agreements about this model is a necessary precondition to, as well as an ongoing part of, linker training. If an adequate model is available, many professional development activities, including training, can be organized around expanding, refining and strengthening the conceptualization and performance of linkers. This effort must be collaborative. Packaged training efforts do not readily lend themselves to mutual adaption and, as a result, are not likely to meet project needs adequately.

The NRC began with a commitment to the Right to Read procedures for curriculum development and school improvement. In addition, the project was under contract to NIE to provide certain definitive types of information concerning linker activity and project operation. One of the first tasks undertaken by project management was the development of a management information system organized around monthly reports and check point reports which reflected the underlying problem solving process of Right to Read and NIE information needs. Working with linkers in refining and adapting this system to describe field events adequately, project managers set down increasingly clear expectations that linkers would work with local school building task forces throughout a multi-step process which begins with needs assessment and ends with an implemented R&D-based solution. While this process is essentially sequential, work pertaining to several checkpoints may be in progress at the same time and recycling is probable. The reporting forms themselves alerted the linkers to the kinds of information and activities project management and NIE believed to be important about their work with schools. The content, structure and language of the forms provided a perspective on the role and helped define critical elements.

A major focus of the negotiations toward building a collaborative relationship between the trainers and

the project was explicating the match between the adopted R2R management information system and our own understanding of and commitment to social scientific research findings about planned change efforts and the politics of change. The agreements reached were reflected in the document submitted to NIE in March 1977. It is our perception that many of the ideas we (the trainers) brought to the project have been incorporated in current descriptions of the R2R model and in elaborations and revisions of the management information system and, therefore, that we have had a major impact on project direction. Given the initial conditions, it has taken many months to successfully work through so many issues. Yet the process we have used underscores the need, at least at this stage in the development of linkage systems, for trainers to work with project management carefully and collaboratively to arrive at agreements about the role of training. It is essential that the training content and process be checked periodically to insure congruence with Project goals and operations.

A second major force shaping the training has been the schools themselves. The process of entry into school districts and gaining commitment to participation from them has varied widely over the life of the project. As a result, the schools' expectations of the project and the linker have ranged from diametrically opposite to highly compatible with project expectations. For example, one district expected the linker to spend half-time being a reading specialist for the district (not a project expectation), while others were aware of and committed to following the Right to Read problem solving process. In addition, each individual school building is organized differently with respect to curriculum decision making, central office and principal

involvement, the type and amount of authority delegated to the task force, the selection and composition of the task force itself, and a host of other factors (levy failures, staff turnover, teacher contract negotiations conflict, student vandalism, school climate, etc.). These factors influence the nature of the reading problem, the willingness to consider altering the status quo, the commitment to long-term versus immediate payoffs, etc., which in turn influence what a linker can and cannot do. They provide a unique set of constraints and opportunities for operationalizing various aspects of the linkage model. These constellations of local school and project expectations and conditions reveal the importance of developing positive relationships between local school personnel and linkers if a linkage system is to be effective in its support of local implementation. Much of our training work has focused around the issue of diagnosing the local system operations, constraints and opportunities, and of developing alternative strategies for enacting the model in these contexts.[11]

A third major force shaping the training in this project has been the resources of NWREL. The staff of both the NRC subcontract for development of the knowledge base and this contract from NIE to provide training and consultation to NRC have been housed in the same program unit (Dissemination Program). This has provided to the training effort the resources of two substantive content areas: research and developemnt in the area of reading, and research and development in the area of dissemination, knowledge utilization and change. The knowledge base in reading contains programs developed nationally (many from NIE sources),

[11] See for example Appendix E, June 6-10, 1977 design and materials.

syntheses of research on reading and the teaching of reading, and primary and secondary awareness materials. These have been sanctioned by regional panels of teachers, reading experts and administrators. The trainers, both social psychologists, bring a rich background in training, in applied social science research in education, and experience in dissemination, development, knowledge utilization, organizational development and the politics of planned educational change. Interaction among Dissemination Program staff members involved in a variety of regional and national dissemination efforts has contributed both depth and breadth to the conceptualizations and resources available to the project and from the project to other efforts.[12]

Collaboration between these two staffs (training and knowledge base), both of which provide resources and support to linkers and management, has resulted in a common emphasis on multiple entry processes, diagnosis of the socio-political structure, operating practices and climate of the local school and development of staff problem solving processes as necessary to the appropriate selection and implementation of R&D outcomes. This approach differs radically from "elitist" or one-party analysis and selection of solutions as when administrators or teachers act alone. During training events we have been able to apply diagnostic procedures and concepts, not only to the local school settings in which linkers work, but also to the analysis of conditions necessary for implementation of specific programs in the knowledge base.

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[12] This has not been without its costs. Unique perspectives can initially be threatening, disquieting and upsetting. Working through the feelings aroused by diverse perspectives takes time and energy. The payoffs, hopefully, are new insights, improved levels of functioning and greater effectiveness.

The fourth major force shaping training in this project has been the linkers themselves. Each was selected in part because of their content expertise in reading, and each has been a classroom teacher. Three of the four linkers were relatively young and inexperienced in the area of linkage. Each has brought to the role a unique background, personal style and understanding of what the project and the linker role are all about. The hiring process involved actors from different agencies having a vested interest in the role. The project managers were, for the most part, not the most powerful actors in the decision. Local district personnel, the intermediate education agency or other housing agent and the state level project representatives all had something to say. Thus, the criteria for selection tended to encompass political as well as professional qualifications and to reflect field rather than project perspectives about the role.

Each linker began work with a set of pre-selected sites where local understanding of the project varied. Each began his or her development as a linker "de nova," with the only guides being prior experience, the written project description of the final proposal and a management information system in its initial stages of development. Where there was turnover at the end of the first year, the primary orientation and socializing agent was the outgoing linker.

Their first contacts in the sites and their comfort (and discomfort) with the expectations of local spokespersons set the stage and established the theme for their first year's work. As the project has developed and the range of "acceptable" linkage strategies has become clearer, each linker has chosen to emphasize different aspects of the role. One gravitated toward the applied research aspect

of the project; another toward providing support for local building readiness to utilize the problem-solving/curriculum development process; others toward the catalytic agent supporting selection of appropriate R&D outcomes. Since the project's beginning, the training needs of each linker have varied widely from one another.

The project began without the luxury of pre-service development of shared understandings and expectations and without opportunities for the linkers to learn from/with each other. Each had a role definition, responsibilities, financial resources and organizational connections which set them apart from their colleagues in their housing agency. By definition they were and are external to the local schools with whom they work. Project management, other linkers and NWREL support personnel are geographically distant. In their day-to-day work, linkers are essentially on their own.

The linker role involves boundary spanning. The linker interfaces simultaneously with a number of social systems: the project itself; each of his or her client school buildings and the school districts of which they are members; the support systems for the project which provide the knowledge base, technical assistance, training and evaluation; the intermediate school agency in which they are housed; the Right to Read program in their state; and various higher education institutions and professional associations. The catalytic nature of the linker role involves increasing the permeability of the boundaries between these systems. One of the central foci of the socialization/professional development training in this project has been to develop a support network among all project-related personnel in response to both the isolation and marginality of the linker role.

We believe that training must be simultaneously responsive to the needs of linkers, project management and local sites if it is to be maximally useful to all concerned. As we have tried to show, those needs are influenced by many factors, and these factors themselves change over time. For training to be so responsive the development of mutual understanding and trust among the actors is necessary, and this only comes with time and the opportunities to experience and work with each other intensively. It also requires an evolutionary approach, with periodic renegotiation of role relationships and objectives. We believe we have been successful in working with the project to integrate our training efforts in supporting project goals. Under project management's overall direction, our work in training has become integrated into project efforts in evaluation and staff development as well.

SECTION 4
TAILORING TRAINING MATERIALS FOR LINKERS

In this section we provide a definition of tailoring and one for modularizing of materials. Next we discuss the purposes and some of the problems and shortcomings of packaged training materials, including modules. Finally we share some experience with tailoring training materials for linkers in this project.

At the outset we wish to define two terms: tailoring and modularizing materials. By tailoring we refer to a process of forming or altering existing training materials to achieve specific training objectives of a specific client. Such a process includes: (1) diagnosing the specific needs of the client, (2) developing a training design to meet those needs, (3) selecting materials to meet identified client needs, and (4) modifying selected materials to fit the design specification. Tailoring is the focus of this section.

By modularizing materials we refer to a process of dividing up or compartmentalizing an extensive training package into discrete pieces or components. One of the best examples of modularizing training materials we have encountered is the Collection of Exercises in PETC-I.[13] The series of handbooks and manuals published by University Associates and the Handbook of Organizational Development by Schmuck, Runkel, Arends and Arends are other examples. PETC-I is designed to train people to use modularized materials, and the OD handbook contains considerable documentation concerning the use of the exercises it contains. Also the materials on group process facilitation, Keys to Community Involvement,

[13] Emory, R. and R. Pino, Preparing Educational Training Consultants: Skills Training (PETC-I), Commercial-Educational Distributing Services, 8116 S.W. Nimbus, Beaverton, Oregon.

developed by the Rural Educational Program at NWREL, contains modularized materials which could be used in a tailoring process. The Network is currently developing packets of resource materials containing handout items which could be used in a tailoring process. In their present draft form they lack many of the elements we consider desirable in a module. Based on our experience, a well designed module should contain:

- A statement of goals
- A statement describing the client group(s) or audience(s) for whom it was developed
- A complete set of instructional steps for the facilitator; including a guide for introducing the exercise and one for debriefing, (helping participants to reflect on the training experience; conceptualize significant learning; and work through the thoughts, feelings and internal states aroused during the experience)
- A statement of any prerequisite experiences needed by participants if they are to fully enter into and benefit from the exercise
- A statement of any conditions under which one exercise should <u>not</u> be used
- A statement of constraints (time requirements, minimum and maximum number of participants, grouping arrangements, space requirements)
- All necessary materials, including diagrams for constructing any manipulable materials needed, oral input outlines and complete text of handout theory papers, worksheets, observer guides, etc., to be used, and a list of any supplies needed
- A list of resources, such as bibliographical material, etc.

We believe that modules still have most of the limitations of any "packaged" training; hence, they also require tailoring in order to meet the needs of the linkers most effectively. However, because modules are shorter, less complex and have fewer interdependent aspects, they are usually easier to work with than larger packaged materials.

Limitations of Packaged Training Materials

From the inception of this project, we have had serious reservations about the use of packaged training materials in providing training support to linker projects. This might seem surprising to some who know us, since we have ourselves directed and been major developers and evaluators of efforts to develop packaged training materials. Packaged training systems developed at NWREL were designed to provide cost effective ways of disseminating knowledge and skills about generic interpersonal, group and organizational processes to teachers and administrators. Much of this content, such as communication, problem solving, consulting, influence, utilizing power and conflict, and planned change is highly relevant to the linker role.

These packages are typically formatted as a four- or five-day workshop for participants who are either strangers to one another or are composed of small numbers of representatives of a number of organizations. This format has proved to be one of the deterrents to using these systems with intact work groups. One difficulty is the amount of time required in a full block; another, the targeting to individuals rather than to staff or staff-client transactions; a third, the absence of historical perspective, since the designs presuppose a participant group begun de novo with the opening exercise and terminated de facto with the closing exercise.

NWREL training packages and others like them were also designed to require a minimum of skills and expertise on the part of the facilitator/trainer. For the most part, facilitators were not required to be skilled diagnosticians or designers. The critical skills of diagnosis and design essential to the task of tailoring in general and to the requirements for modifying such packages or their subparts in particular, will be described in succeeding pages of this document.

Given these conditions, the learning experiences and instructions had to be: (1) based on a set of assumptions about the participants, their historical relationship with one another and their motives for participation, which are unlikely to hold in any ongoing working relationships; (2) focused on individual development rather than on exploration, explication, development and expansion of organizational dynamics; (3) targeted to generalized, often hypothetical situations or to the controlled conditions of the workshop itself, rather than to actual working conditions.

For the purposes of training linkers (or persons who work together in projects or tasks within the same organizational context) "packaged" training, whether modularized or not, has several limitations:

1. Consider the needs of linkers. It has been our experience in working with linkers in the NRC that the most critical needs when linkers are brought together for training are: (a) emotional and peer support[14] (including interpersonal relationships within the project), (b) crisis management and critical problem solving at the local sites, (c) assistance with "nitty gritty" project maintenance (writing reports, use of time managing budgets, etc.) and (d) broadening skill development in linkage. It is unlikely that packaged training efforts can be simply transmitted across unique settings without considerable tailoring to meet these specific needs. <u>They lack responsiveness</u>.
2. Packaged training materials often lack <u>contextual relevance,</u> as the skills are taught using simulations, exercises and

[14] Richard Schmuck, in reviewing more than a decade of his research on developing cadres of internal OD specialists included support as the most critical variable. University of Oregon, Eugene, Oregon, 1978.

case studies designed for some other audience (such as teachers, administrators, etc.) and so lack a sensitivity to the social environments in which linkers are likely to work (e.g., across orgnaizational boundaries without formal authority, etc.). Since there is not yet a commonly accepted role definition for linkers, contextual relevance is likely to be project or program specific for at least the next few years. As a result, materials will need to be tailored to the specific requirements of each effort.

3. Packaged training often does not provide the learner the opportunity to work from his or her own experience. Packaged training is often not designed to work on problems, issues or concerns which participants bring with them to the training, because it is virtually impossible to predict these without reference to specific socio-political and interpersonal contexts.
4. Packaged training often does not take into account the group dynamics and interpersonal relationship issues that intact groups of participants bring with them to the training session. These issues and the shared past history surrounding them may interfere with or preclude generating in the training setting the supportive climate necessary for the development of personal and interpersonal skills.
5. Packages are often tightly designed, with activities that are highly interdependent, each leading into or building upon experiences, concepts or materials introduced in succeeding or preceding activities. In these cases, simple modularizing is impossible. This is a particularly important limitation. When the total design is tight, any activity needs extensive redesign if it is to be used outside the total context.

Modules suffer from all of these limitations except the last. The critical element in designing linker training, then, is tailoring. Packages and modules should be seen as raw materials and resources to be used by the skilled trainer to form and adapt in the process of developing a specific design for a specific client group to meet a specific purpose in response to a contextually diagnosed and agreed upon set of needs or issues. Such raw materials and resources are important--even necessary--if the trainer is not to spend an inordinate amount of time and energy developing materials for training. They are also critical to keeping training costs within reasonable bounds. But they are <u>not</u> sufficient. No collection of modules, whether in packaged training format or in sourcebook form, can be expected to be used "as is" or to substitute for the diagnostic and design skills of a qualified trainer because of the limitations built into their construction and conceptualization as "general purpose" tools.

<u>Diagnosis</u>

The foundation of good design is built on a framework of adequate diagnosis of the specific audience and its peculiar situation. Every training event has as its goal some kind of change in the way the client system and its individual members operate. Even where a given training event has an agreed on sequence, it is important to start with a clear picture of the current state of affairs around the issue like:

1. Who wants what to change? (Do linkers want managers to change, school people to change, themselves to change; does management want linkers to change, interaction between management and linkers to change, themselves to change?)

2. What consequences, intended and unintended, would the desired change have? (Would linkers, in becoming more skilled in organizational diagnosis in their schools, also become more critical and demanding of the organizations in which they are housed? etc.)

3. How much are the perceived difficulties due to lack of skill or expertise and how much are they due to lack of vision, fear of risk, unrecognized alternatives, too short time frame, over or under optimism, inappropriate expectations of self or others, etc.?

4. What issues or concerns are surfacing in the interactions among linkers, resource holders, client schools, etc. that suggest reordering of priorities, sequence, etc.?

5. What evidence of internalization (or its lack) suggests introducing new material, recycling, trying different methods of work around issues already dealt with, etc?

The data to answer these questions come from the trainers having spent sufficient time listening, questioning, observing and checking out their impressions of the current state of affairs. These data and the agreed upon foci for the training event, in conjunction with the conceptual perspectives of the dissemination process, project goals, and linker role being used, yield a set of key concepts as the content of the training event. We have found it most useful to begin our actual design work with an assessment of potential negative consequences of dealing with these issues and concepts.

One of the keys in this analysis is the concept of resistance. It is normal and even healthy for the human organism and the social systems created by human beings to resist change. Resistance is an important protective mechanism to preserve stability, predictability and continuing sense of the value of what one has been and done. Pressure to change or improve arouses feelings of guilt, inadequacy and powerlessness; change results in instability, unpredictability and doubt. Until new learnings, behavioral or conceptual, are thoroughly integrated into daily routine, change and growth are as unsettling as they are exciting. As we begin to lay out the areas of focus for a training event, we make notes about things to be taken into account in the final design, in this case ways in which resistance is likely to be manifested, the kind of

introductions to activities needed to help participants to deal with their discomfort, and the type of directions or interactions to avoid because they could induce or support existing feelings of inadequacy.

A second key is the concept of divergence. Of the forces shaping the development of the training, those having to do with the linker as a person and with the unique characteristics of the local sites contribute most to divergence. Recognition, review and support of individual differences are essential if linkers are to internalize and apply the training. A second focus of our initial layout notes, then, deals with supporting divergence. As we begin planning the design of learning experiences around the chosen topic areas, we are obviously concerned with providing conditions and structures leading to common experiences, understandings and conceptualizations among participants. At the same time, we are concerned with giving recognition and support to differing personal styles and socio-political necessities. We have found it useful to focus initially on ways to support divergence. For example, we make note of opportunities for eliciting multiple responses, and for exploring differences in conditions. These ideas are then worked into whatever activities and materials are chosen to provide common experiences.

A third key is the concept of value differences. Linker training and knowledge utilization processes must take into account the array of value differences people evidence in interacting with, relating to and understanding other human beings. Problem solving and decision making can be and are viewed as win-lose processes, processes of negotiating between equally compelling alternatives, rational planning processes, or as the exclusive province of experts or managers. The conflicting values school personnel hold toward phonics, sight or variations on these approaches

to teaching reading often underlie a school task force's difficulty in choosing any reading improvement program. It is incumbent on the trainers to support and allow for exploration of such value differences. We pay particular attention to opportunities to support linkers in developing ways to respond to value conflicts between themselves and their client groups, within the client system itself and among participants and between participants and trainers.

These inital notes assist in clarifying objectives and design requirements. These can be formally stated if necessary, or the notes can be used "as is" in the process of reviewing, searching, selecting and adapting or creating materials and exercises for the training event. An example of the kind of notes we make and the issues we review before beginning to design is given in Appendix C. They have been typed in much the same form as originally written. These notes were used in designing the activity described in Illustration 1 and discussed on page 47.

Creating the Design for a Structured Training Event

Once a time frame and training content have been jointly determined by all relevant parties and the design objectives and requirements determined from an analysis of convergent and divergent forces, value differences and possible resistances, an outline of the total design is developed. At this point, it is often wise--and sometimes politically necessary--to review the outline with managers and linkers to be sure that the analysis and diagnosis is on target and to maintain the collaborative relationship.

A training event or series of events is more than a collection of pieces; each activity contributes to a whole. Some of our working

criteria for good design include:

1. Each activity has a clear focus in itself; directions are straightforward and alternatives are clear.

2. Each activity leads smoothly and logically into the next; whatever work participants do is picked up and used in subsequent activities so that conceptualization flows and builds.

3. Each activity or sequence of activities allows for exploration of value perspectives, individual style preferences and situational constraints and opportunities.

4. Directions focus attention on externalizing and making use of internal states, such as the feelings aroused during the activity, as well as on formulating a cognitive response to the materials and experiences.

5. Participants are able to work with and use their own feelings, experiences, understandings and responses rather than being expected to regurgitate or imitate a single "right" response.

6. Time is allowed and directions given to provide various forms of individual, small group and total group work so that participants can make maximum use of their own and each other's resources and experiences.

7. Ample time is allowed and clear directions given for reflection on and assimilation and integration of new material and elicited responses.

8. Work flows from reflection and insight into the training activity to hindsight on significant past events in order to develop foresight.

9. Resistance to (and costs of) changing are worked with as actively as motives for (and gains of) changing.

10. Activities mobilize and release participant energy so that they are engaged and "alive" to the implications of the activity for their daily life.

11. Activities support a developing sense of potency rather than allowing participants to put themselves down for inadequacies.

12. Adequate attention is paid to participant's needs for physical comfort and movement; for time to relax, talk to one another and play; and for variety in type of activity, pacing and intensity.

These criteria, along with specific objectives and requirements in each topic area determined from the diagnosis, guide the selection,

adaptation and sequencing of materials and exercises.

Selecting and Adapting Existing Materials and Exercises

The objectives and requirements determined during the diagnosis provide the first set of criteria for selection and adaptation. For example, suppose that one of the topics chosen for an event is decision making, and the diagnosis indicated a need to develop skills to facilitate collaborative decision making processes in task forces. There are any number of existing materials and exercises in this area. Some focus on concensus procedures; some on comparisons of individual versus group methods; some on planning procedures like decision tree analysis. Each of these can provide a basis for exploration of a particular value perspective, a vehicle for skill development in a particular strategy or a framework for analyzing conditions under which one procedure is more or less appropriate than something else. To clarify any of these potential foci, however, the stage-setting introduction and the reflection questions used in debriefing need to be specifically adapted to the purpose.

Other exercises in this area deal with comparisons of both/and decision processes to either/or processes. Some deal with power issues overtly, others ignore them or are deliberately structured to avoid them. Such exercises can provide a basis for work on some of the critical organizational issues surrounding decision making, such as power, competition or vested interests, as well as on the procedures themselves. Choosing from among the full set and structuring the specific stage-setting and debriefing foci to be used with them requires an understanding of the underlying dynamics to be surfaced and explored. The design requirement notes guide the specific selection and modification to fit these dynamics.

A second set of criteria for choosing and altering revolve around the requirements of the available exercises. Each exercise differs in the prerequisite experiences, the nature of the learning climate and the degree of observational skills required. If these do not match the group's functioning and if the necessary prerequisites and conditions are unlikely to develop prior to presenting the exercise, then it is unwise to use it, even if modified.

At another level, every existing exercise is built around time, number and groupings of participants and energy requirements. Some are short, others require as much as a full day; some require a specific number of actors, others don't; some require intensive focused energy, others are low-key. Each of these factors must be considered in terms to fit the overall plan, time constraints and participant limits.

A third set of criteria revolves around the range of responses that each of the available exercises is likely to arouse. In a very fundamental sense, one can, as one of the linkers says, "teach the whole world from the petal of a rose." The difference lies in the intensity and focus with which specific states of being, thinking and feeling spring spontaneously to the surface. The trainer must have some of the clinician's sensitivity to motive and need arousal and their display in interpersonal transactions if he or she is to comprehend and anticipate the consequences of a particular set of participants engaging in the interplay demanded by the exercise. For example, where participants are relatively secure with themselves and one another and have explored the real risks as well as their fears of disclosure, an exercise calling for observer feedback can be very useful. On the other hand, the use of an observer may confuse rather than clarify when participants have not yet surfaced and explored issues of observational distortion and defensive response

due to factors such as need for inclusion, control or achievement.

Unless directions, stage setting and discussion are carefully handled, some exercises may be unproductive, even disfunctional. For example, some exercises arouse envy in some participants, which often leads to spitefulness toward the person envied or to depression and withdrawal. Other exercises arouse competition and may lead to oneupsmanship, pleasing the teacher or "wooden-leg"[15] (a "game" identified by Eric Berne). If the training context does not allow for insight to develop around some of these dynamics, then the wise trainer will try to avoid their arousal rather than permit the training to reinforce a lack of esteem for self and others.

We can not say that we have been entirely wise nor even moderately successful in our attempts to take all these factors into account as we have created and executed our training. We are, however, clear about our goals, aware of our failings as they occur, and continuously learning how to be that which we purport to be.

Designing Activities to Make Use of Input Materials

There are no existing exercises or training activities built to incorporate the precise set of circumstances with which linkers in this project must deal. It is important, therefore, that the designs for introducing materials particular to this project incorporate the elements of good design.

Example of the Application of Design Criteria in the Development and Execution of a Segment of a Training Event

The working notes included in Appendix C are an example of initial

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[15] "Wooden-leg" is characterized by a response which says, in effect, "What else can you expect from someone with my handicaps?" See Eric Berne, Games People Play, Grove Press, Inc., New York, 1967, pp. 159-162.

planning for developing a design to assist linkers in making research summary materials available and useful to school building task forces. These materials are part of the knowledge base of the project. While some linkers were comfortable with simply giving the materials to some members of some task forces to read, they and other linkers raised questions such as: How do these summaries fit into the R2R assessment activities of the task force; when should we use them; should we just be familiar with the findings and talk about them when appropriate or are there other ways to use them without raising task force resistance; why can't we just have a one-page overview to distribute; what do I do when teachers just don't believe the findings?

While it is perfectly possible to respond to such questions, the "information" aspect is only part of the concern. Responding to the questions as questions of information would model a role which linkers were unlikely to adapt to their own situations. In a more fundamental sense, the questions raised ask for opportunities to become comfortable with, and feel competent in making use of research-supported generalizations in a collaborative problem solving, diagnostic process. The Northwest Reading Consortium linkers have consistently felt that they should not adopt the role of resident expert. Rather, they see themselves being much more effective by playing a supportive, facilitating role in a joint problem solving effort. To then assume the position of "expert on the research" vis-a-vis their task forces is seen as antithetical to the working relationships they have established. The training issue then was to design an experience which would support a developing sense of comfort and confidence in using the summaries in ways consistent with the role and relationsips they had established.

Illustration I is a design for using knowledge base research summaries in the R2R process. The particular design we used was neither our best nor our worst. As such, it serves to illustrate an operationalization of our design criteria and where compromises to meet time and other constraints are likely to lead to difficulties.

In this example, several applications of the criteria for good design (pages 39 and 40) are apparent, as are several places where more careful attention could have enabled the design to flow more smoothly with less frustration to both participants and trainers.

While the directions for the individual reading activity were clear and straightforward (criterion 1), the directions for groupings caused some confusion. The directions were not clearly connected to the later work to be done which provided the rationale for grouping (criterion 6, use of each other's resources).

The sequence of activities, flowing from focused reading to selected application to implications, reflect criteria 2,3,6 and 10. This sequence also allowed participants to work from their own sense of what was important in the research (criterion 5) to feel competent to work with research material if they were not used to this area (criterion 11), and to respond to both the emotional and the cognitive elements of the learning experience. The one-to-one work with a resistant participant (allowed for by the sequence, grouping and the freedom provided to the trainers to respond to the immediate situation) illustrates criterion 7.

Inserting the lunch break into the sequential flow from reading to application without allowing adequate time for participants' own agendas and interaction needs, and the resulting inadequate time for concentrated individual work, illustrates the importance of attending carefully to criterion 12.

Illustration I

A DESIGN FOR USING KNOWLEDGE BASE RESEARCH SUMMARIES IN THE R2R PROCESS

Design	Commentary
11:00 a.m. Stage Setting Purpose: Overview of sequence; introduction to research summaries and how to proceed: Synthesis of Research in Basic Skills, Doris Gow, University of Pittsburgh Research Within Reach, CEMREL, Inc. Research Summaries, Dr. Ruth Waugh, University of Oregon The Cognitive Development of Young Children, NIE The Social Development of Young Children, NIE	Stage setting included, for example, directions not to spend a lot of energy arguing with those parts of the findings or generalizations with which you can't agree; instead, focus on things you can agree with and support. As expected, some of the resistances around "Why do all this work? Just give us a simple summary," were manifested in complaints, grumbles, etc.
11:15 a.m. Divide Into Three Groups In each group divide up reading and review of above documents among members; focus for reading: select 3 or 4 generalizations from the research materials which you will use this afternoon in reviewing project guidelines for one of the following: • Collecting needs assessment data • Setting selection criteria • Reviewing prog am packets	We suggested here that groups be composed heterogeneously among roles and working relationships[1] to make use of the variety of experiences and perspectives in the group, and most participants were willing to do this; some were not, and this created some confusion. Some groups also had difficulty dividing up the reading responsibilities. Some persons maintained the impression that they were to read and digest all five summaries.

[1] In this event, for the first time in the life of the project, linkers from NDN and the Network, a State Dissemination Coordinator, an Rx Director and a local district R2R director were present in addition to project personnel.

(Illustration I, Cont.)

Design	Commentary
11:30 - 1:30 p.m. Lunch and Individual Preparation Work	Lunch broke the focus. Most participants had agendas of their own to pursue with one another, and some of this carried over into the work time. As a result, some persons felt unprepared and thus less than eager to get into the next task. More time and slower pacing of the work sequence would be needed for this to move smoothly.
1:30 - 3:30 p.m. Small Group Work Each group select an area for analysis, record implications on newsprint to share with total group. Provide work groups with: • Appropriate R2R materials or program packets • Focus Questions • Meeting Space • Newsprint • Markers	This work proceeded fairly well. One participant unexpectedly became adamantly resistant to the task, and this had to be worked through on a one-to-one basis with the trainers. The group in which he was a member continued to work, but under some tension.

Focus Questions:

Group 1. Needs Assessment

Given the generalizations you have selected from the research, what data would a task force need to collect to determine gaps in the current reading programs of a school? Which of these variables are covered in the various state R2R handbooks, which are missing or overlooked?

Group 2. Selection Criteria

Given the generalizations you have selected from the research, what criteria are implied for selecting among alternative reading improvement programs?

(Illustration I, Cont.)

Design	Commentary
Which of these are reflected in the various state R2R handbooks? What is missing or overlooked? Group 3. Program Review Given the generalizations you have selected from the research, how do these two programs' descriptive materials indicate that attention has been paid to these findings?	
3:30 - 5:30 p.m. Small Group Reports and general discussion of research utilization issues at the local level	This activity went very well. Participants were actively involved in the reports and discussions that followed. The only difficulty was having to cut off discussion of each area in order to leave time for all to report. The work done by each subgroup not only focused attention on the issues we had hoped to work on, but generated a strong base of concrete evidence and experience so that discussion was more than an exchange of soap box positions.

SECTION 5
SUMMARY OF GUIDELINES

In this section we summarize the essential elements of the tailoring process as we understand and experience it. Following each point we reference the pages in the document where it is discussed.

1. The goals of any training effort may vary from:

    a. Convergent skill training, to

    b. Individualized development of skills and understandings, to

    c. Creating organizational structures and climates to support the development and use of new skills

    These alternatives may be viewed as mutually exclusive; however, our experience suggests that an inclusive perspective is more likely to produce maximum long-term gain. (page 17-18)

2. Changing behavior, including developing new skills, requires an eclectic approach. This includes normative re-education which deals with the social matrix in which individuals and their behaviors are embedded, and the use of rationally and politically based strategies in changes. (page 19-21)

3. Successfully designed and implemented tailored training requires negotiating the sets of needs to be addressed, the expected outcomes and the training approaches to be used with interrelated sets of actors, specifically including project management, linkers, trainers and their related organizations, funders and influencers. (page 21-22)

4. Agreements among managers, trainers and linkers about the training effort are developmental and evolutional. Not only are agreements about goals, foci, central issues and acceptable strategies essential precursers to any training endeavor, but also these agreements need to be seen as renegotiable and developmental throughout the life of the relationship as experience, changes in goals, conditions, knowledge and/or research warrant. (page 23)

5. If training is to be tailored to specific dissemination project or system needs, at least the following six factors must be considered:

    a. Project or system goals
    b. The dissemination process model being used
    c. The concept of the linker role being advocated

d. The nature of the disseminates
e. The nature of the client agencies' relationship to the project or dissemination system, their internal structures and operating conditions and limits, and the problem solving processes they use or are seeking to use
f. The relationships among linkers, managers and other support staff (pages 23-31)

6. Tailoring of training materials includes, in addition to the process of negotiating agreements and reaching understanding concerning the functions, operations and goals of the project: a) adequate diagnosis of the specific current needs of the project and its staff, b) developing a design to meet those needs, c) selecting material to meet identified needs, and d) modifying materials and creating or adapting instructional strategies to fit the design. In actual practice, the activities of b,c and d are so intimately related that there is often a QED sense to the analysis. Once a particular alternative is chosen, other decisions often "fall into place" almost as givens. (page 33)

7. A variety of useful materials, training programs, collections of exercises, theory papers, project materials, etc. exist as working materials for the tailoring of training. (pages 33-34)

8. Modules, training program materials, or collections of exercises are most useful if they contain statements describing:

- Their goals
- Intended audience or client
- Complete instructions
- Prerequisites
- Constraints and contraindications for use
- Copies of all necessary materials
- Backup resources, references, bibliographies (page 34)

9. In the process of tailoring training materials, including pre-existing modules, training programs and exercises need to be adapted in order to:

- Increase their responsiveness to identified needs
- Provide contextual relevance to the specific situation
- Provide opportunity for participants to work from their own experience
- Take into account the dynamics and interpersonal, historical and socio-political relationships within the project and its relational networks
- Provide missing prerequisites or followup experiences (pages 35-38)

10. Key questions we consider in diagnosing specific training needs at a specific point in time within an overall agreed upon framework include:

    - Who specifically wants what to change at this time?
    - What consequences, intended and unintended, would the desired outcome or change have?
    - What appear to be the underlying "reasons" or "causes" for the conditions, behaviors, relationships, etc. in which change is desired?
    - What reordering of priorities, sequences, foci, etc. are suggested by current issues, concerns and unfolding events in the field?
    - How have previous training concepts, activities, etc. been received; have they been used and integrated into ongoing practices? (pages 38-39)

11. Key design, training, and interpersonal skills needed by trainers in order to tailor designs and implement them include: working with resistances, recognizing and accepting individual differences and recognizing and dealing with value conflicts. (pages 38-41)

12. Criteria we find useful for developing a design include:

    - Each activity has a clear focus
    - Each activity builds cumulatively on prior activities and follows a logical sequence
    - Activities allow for exploration of differences in values, personal styles and situational conditions
    - Feelings and emotions as well as cognitions must be anticipated and provided for in the design
    - Activities focus on developing a personal and organizational repertoire of responses rather than on presented answers
    - Opportunity to make maximum use of personal and peer resources and experience is provided
    - Opportunity for reflection on and integration of new material and elicited responses is provided
    - Attention is given to resistance to change as well as motives for change
    - Activities mobilize and release participant energy
    - Activities support participants' sense of potency
    - Attention is paid to participants' physical, emotional and pacing needs (pages 41-43)

13. Criteria for selecting among existing materials include: a) objectives and design requirements determined from the diagnostic analysis; b) requirements of the available modules, training materials, or exercises themselves; and c) the range of motives, needs and responses each of the available sets of materials are likely to arouse. (pages 43-45)

14. Much of the content material with which linkers must deal, particularly the nitty-gritties of the particular project or dissemination system are not incorporated with existing learning exercises or training designs. The criteria for good design must be applied to designs for introducing and using these materials. (page 45)

APPENDICES

APPENDIX A: Definition of Educational Dissemination

APPENDIX B: Relationship Among Three Problem Solving Change Models and Linker Skills and Knowledge Related to Each Step

APPENDIX C: Example of Working Notes for Designing in a Topic Area

APPENDIX D: Key Events in Relationship Between the Tailored Dissemination Training Project, NWREL, and the Northwest Reading Consortium, July 1976 - March 1978

APPENDIX E: Outline of Designs of Formal Linker Training Events for the Northwest Reading Consortium, December 1976 - January 1978

APPENDIX A

DEFINITION OF EDUCATIONAL DISSEMINATION

Dissemination in education consists of sets of processes requiring the transformation and utilization of knowledge across boundaries of loosely coupled, socio-political systems for the purpose of creating and supporting educational improvement.

1. Dissemination. We have extended the concept of dissemination as described in the DAG Report to include activities related to five distinct levels of outcomes: spread, exchange, choice, implementation and capacity building. Within each level (outcome) there are many possible approaches. (E.g., ERIC, newsletters and brochures, marketing, speeches, all may lead to spread.) We do not assume that the categories are either simplistically related, necessarily sequential, or cumulative (e.g., that all the activities associated with a lower numbered level lead to or support higher numbered outcomes).
2. Sets of processes. This recognizes that dissemination involves complex sequences of activities directed toward achieving outcomes. For instance, to achieve the outcome "choice" may involve such processes as problem diagnosis, search behavior, value clarification, criteria selection, decision making, etc.
3. Transformation. This recognizes that knowledge is initially conveyed through specialized languages of knowledge producers which is often different from the language of the knowledge users. Hence, a recasting of content from one language system to another, hopefully without loss of fidelity in meaning, is required. Secondly, knowledge transformation may take the form of program

development based on research findings.

4. Utilization. Emphasis upon an active process of using knowledge to achieve outcomes. Utilization ultimately implies change for individuals or groups; hence research on educational change is relevant.
5. Knowledge. Broadly defined to include (1) conceptual understandings, (2) materials and products, (3) value orientations, (4) behavioral skills, (5) role relationships, and (6) organizational structures.
6. Boundaries. Dissemination is an activity in which knowledge spans across the boundaries of social systems. A key distinction separating dissemination from the more generic process of problem solving.
7. Loosely coupled, socio-political systems. This emphasizes these two critical, salient features of the educational system.
8. Educational improvement. This implies that all dissemination involves change, conflict and gains and losses.

APPENDIX B

This chart compares the steps of three problem solving change models. A list of linker process skills and knowledge relevant to each step follows.

RELATIONSHIP AMONG THREE PROBLEM SOLVING CHANGE MODELS: Phases of Planned Change (Lippit, et al), Northwest Reading Consortium Project Steps, and Right to Read Assessment (State of Washington)

Phases of Planned Change	NRC Project Steps	Right to Read
1. The Need for Change	1. Entry into School District and Establishing Relationship	1. Establish District Priority for Reading Improvement
2. Entry-Establishing Relationship	1. Entry (see above) 2. Task Force Organization	2. Set up Task Force
3. Diagnosis	3. Determining Target Populations 4. Program Assessment Process	3. Identify Population 4. Assess Current Program
4. Examine Alternatives and Establish Goals	5. Summarize Priorities 6. Develop site Specific Problem Statements and Establish Goals and Objectives 7. Select R&D outcome	5. Identify and Priority New Objectives 6. Review Effective Programs and/or Program Components 7. Plan Program of Diagnosis, Prescriptions and Evaluation
5. Implementation	8. Develop Implementation Plans 9. Install R&D Outcomes, Materials	8. Identify Instructional Approach, Method and Techniques 9. Plan Staff Development 10. Identify Needed Personnel, Materials, Services and Costs
6. Institutionalization Generalization	10. Establish Management Activities, Inservice Schedule 11. Monitor Implementation Plans 12. Evaluation	11. Evaluation
7. Terminating/Redefining the Relationship	(not yet conceptualized)	NA

SOME LINKER SKILLS RELATED TO MACRO PHASES OF PLANNED CHANGE AND SPECIFIC STEPS OF NW READING CONSORTIUM PROJECT

PHASE 1 THE NEED FOR CHANGE

Project Step 1: Entry into School District and Establishing Relationships

Focus: Selecting Districts for Participation

Process Skills and Knowledge

Assessing/Diagnosing System Readiness for Change

Conditions for Change

Needs Assessment

Awareness Techniques

PHASE 2 ENTRY--ESTABLISHING THE RELATIONSHIP (LINKER)

Project Step 1: Entry into School District and Establishing Relationships

Focus: Establishing Linker Relationships

Process Skills and Understandings

Diagnosis--System Readiness

Theory--A Coherent Change Theory

Knowledge--Specific to District and Site How it Operates; Planning, Budget Decision Making Levels

Communication Interview Skills

Entry Points and Entry Strategies

Minding the Fences, Building Bridges

Operating in Temporary Relationships

Identifying Formal and Informal Power Structure

Conflict Diagnosis and Utilization

Working Effectively with Multiple Bosses, Authorities and Influencers

PHASE 2A ESTABLISHING THE CHANGE TEAM (TASK FORCE)

Project Step 2: Task Force Organization

Focus: Setting Up and Orienting Task Force

Process Skills and Knowledge

Change Theory

Group Process Skills--Leadership-membership; task and maintenance functions; agenda setting; goal clarification; problem; conflict utilization; decision-making; communications; dealing with feelings; stages of group growth; interventions that facilitate group process

Negotiating Linker Role with Task Force

Establishing Helping Relationships

Helping Schools to Successfully Utilize Consultants

Consulting Skills

Record Keeping, Minutes, Documentation

Clarifying Setting Appropriate Expectations for Task Force Role

64

PHASE 3 PROBLEM DIAGNOSIS

Project Step 3: Initiating Meetings and Determining Target Populations

Project Step 4: Program Assessment Process

Process Skills and Knowledge

Conducting Needs Assessment/Diagnosis
- a. Curriculum/Content
- b. Organizational/Structure, Process, Climate
- c. Community/Values, Commitment, Climate

Problem Solving - Systems Analysis
Collaborative (RUPS)
Negotiative (SC&NPS)
Linear and Non-Linear Models

Successfully Utilizing Consultants

Values Clarification, Articulation

Decision Making--Convergent and Divergent Processes

Conflict Utilization, Resolution

Group Process Skills

Planning Skills

Content Area Process Skills (reading, math, etc.)

PHASE 4A EXAMINING ALTERNATIVES

PHASE 4B ESTABLISH GOALS: INTENTIONS AND DECISIONS

Project Step 5: Summarizing Priorities

Project Step 6: Developing Site Specific Problem Statements and Establishing Goals and Objectives

Project Step 7: Selecting R&D Outcomes

Process Skills and Knowledge

Brainstorming

Group Problem-Solving

Facilitating Group Process

Decision-Making

Conflict Resolution

Resource Retrieval/Awareness of Procedures, Content

Knowledge, Material Transformation

Utilization of Consultants

Negotiating/Matching Problem Definitions and Potential Solutions

Utilization of Knowledge Bases, Human Resources

Reality/Feasibility Testing

Assessing R&D Outcomes for Key Implementation Issues Which Might Effect Decisions to Adapt/Adopt

PHASE 5 IMPLEMENTATION: TRANSFERRING INTENSIONS TO ACTIONS

Project Step 8: Developing Implementation Plans

Project Step 9: Installing R&D Outcomes
Purchase Materials
Adaptations/Integration

Process Skills and Knowledge

Models of Innovation and Change
- Planning
- Collaborative
- Negotiative

Creating the Readiness for Change at the Local Level

Program Development and Design Skills

Program Adaptation

Implementation Theory--Multi-Level Strategies

Gaining Acceptance and Support of Plan

Training, Staff Development

Intervention Theory

Planning Process - PERT, Systems Analysis, Fault Tree Analysis

Budgeting Processes/Procedures

PHASE 6 INSTITUTIONALIZATION/GENERALIZATIONS

Project Step 10: Establishing Management Activities and an Inservice Schedule.

Project Step 11: Monitoring the Implementation of Program Plans

Project Step 12: Evaluation

Process Skills and Knowledge

Planning

Management

Evaluation

Maintain Support

Renewal

Interaction

Training

Consultation

Monitoring

R&D Skills

"Packaging"

Assessment of Long-Term Objectives

"Feedforward"

PHASE 7 TERMINATING/REDEFINING THE LINKER RELATIONSHIP

Process Skills and Knowledge

Self-Renewal

Evaluation

Termination of Relationships

APPENDIX C

EXAMPLE OF WORKING NOTES FOR DESIGNING IN A TOPIC AREA

Topic Area: <u>Using research summaries to support and influence building task force work</u>

Afternoon Session: Research summary use

Issue: "Somebody should provide a highlight summary that we can just pass out." That is -- too much to read, digest; no focus for using, interpreting; when to use. Need to focus on implications for:

- What data about current program is significant?
- Is any missing from R2R guidelines, and if so, how add or focus attention on?
- Selection criteria, what does R2R reflect?
- Review of programs, what to look for?
- Use new additions to knowledge base? or familiar packets?

Model a potential design for task force use at these steps in the process.

Provide for discussion of how to use with task forces to emerge; don't push it.

Issue: Can easily get hung up in "critique" of research. Some potential attitudes of research being "too intellectual," "not useful," "too complex" or "too over-simplified," "not my experience."

Need stage setting on key generalizations, findings. Provide a summary of issue areas to guide reading and selection of important generalizations.

Issue: Multiple roles to be present:

- What can non-linkers get out of this work?
- Think about teaming versus separating linker-site level, linker-state department pairs coming, gains and losses each way (each works differently with task forces)
- Time to talk about and share how might apply work done in session, adapting to differences among task forces

If focus turns from task force to R2R assessment tools, work this toward institutionalization, feedback to R2R, etc.

Some resistance; avoidance of work could come from resentment of recent NIE push to increase adoptions; working with materials could be right now with getting us to toe the line" when energy is more directed to seen as part of "problem solving-- Important to let this surface and integrate and make use of this after exercise -- Allow discussion time after exercise

helping schools change process. diagnostic change process. Allow discussion time after exercise -- watch for signals.

work thru if it's an issue.

watch for signals.

Discussion question -- what if research generalizations go counter to attitudes and values of task force members?

In morning session, allow time to form groups of 4-5 -- instructions for dividing up review of research summaries among individuals -- reading time to prepare; focus questions for each group. R2R and program packets for work

newsprint

long disc. time for total grp

APPENDIX D

Key Events in Relationship Between
The Tailored Dissemination Training Project, NWREL,
and Northwest Reading Consortium, Washington SPI
July 1976 to March 1978

July 1976	Initial exploratory contact occurs in Washington, D.C. at RDUC Directors Meeting between NWREL staff and NRC staff.
August 1976	NIE directive to focus Program activities and service to RDU and RDx clients, including tailored training services and the NRC.
September 1976	Continuation of exploratory discussion of relationship between NRC and NWREL.
October 1976	Agreement reached to conduct first training session in December.
December 1976	Initial linker training conducted December 13-17. Prepared 3-5 year Plan for NIE.
January 1977	Agreement to conduct one day of training at next Advisory Meeting in February. Provided onsite consultation to Alaska linker.
February 1977	Linker training, February 9. NIE asks NWREL for a scope of work statement to provide tailored linker training.
April 1977	Prepared a Collaborative Planning Document for Training to NRC. Secured agreements to access Project data. Continued building a collaborative relationship
May 1977	Site visits to each linker in Alaska, Washington, Oregon, Idaho. Linker Training Workshop, June 6-10. NRC Director resigns.
August 1977	Provide staff development/training workshop to Maywood Jr. High, Issaquah. Developed Operational Plan for FY '78. Confirmed a continuing relationship with new Project Director, including greater integration of management, evaluation, knowledge base and training support systems.
September 1977	Linker Training Session, September 15 & 16.
October 1977	Linker Training Session, October 24.

December 1977	Management, coordination and planning for Project budget revisions and subcontract additions for training. Evaluation Planning and Coordination Session.
January 1978	Conceptualization Conference--Linker Role, January 3-5. Linker Training Session, January 18-20, included linkers from other RDU projects and administrative staff from some host agencies.
February 1978	Evaluation Planning Sessions and training contribution to site case studies. Set up monthly planning sessions for training.
March 1978	NWREL announces redirection of Dissemination Program

APPENDIX E

Outline of Designs of Formal Linker Training Events for the Northwest Reading Consortium December 1976 to January 1978

December 13-17, 1976	Outline and materials list
February 8, 1977	Outline and materials list
June 6-10, 1977	Outline and materials list
September 15-16, 1977	Outline and materials list
October 24, 1977	Outline and materials list
January 18-20, 1978	Outline and materials list

DESIGN OUTLINE*

Northwest Reading Consortium Linker Training
Menucha Conference Center, Corbett, Oregon
December 13-17, 1976

Sunday, December 12	7:30-10:00	Getting acquainted, goal setting, agenda sharing
Monday, December 13	8:30-12:00	Multiple roles of the linking agent; "Superperson of the 70's"
	12:00-2:00	Lunch and independent study/reading (4)
	2:00-5:30	Linking as helping - 1) Process of making entry and building relationships with clients (1)
	7:30-10:00	Linking as helping - 2) Process of facilitating and conducting meetings (2)
Tuesday, December 14	8:30-12:00	Linking as retrieving and conveying resources; "Process of matching needs to R&D outcomes" (3)
	12:00-2:00	Lunch and independent study/reading (4)
	2:00-5:30	NW/RDUC project information systems (5)
	7:30-10:00	Free night
Wednesday, December 15	8:30-12:00	Linking as facilitating and training in problem solving; "The Social Negotiative Problem Solving Model" (6, 7)
	12:00-2:00	Lunch and independent study/reading (4)
	2:00-5:30	Linking as facilitating and training in problem solving; "The Research Utilizing Problem Solving Model" (8)
	7:30-10:00	Discussion of readings; concepts of change in education (4)

*Numbers in parentheses refer to materials at the end of each outline.

Thursday, December 16	8:30-12:00	Community involvement: Delphi, PDK, et al; programs, strategies and pitfalls to avoid (9)
	12:00-2:00	Lunch and independent study/reading (4)
	2:00-5:30	NW/RDUC Project evaluation (10)
	7:30-10:00	Free night
Friday, December 17	8:30-12:00	Self-assessment; planning for future growth; resources available from NWREL; planning for future work
	12:00-2:00	Lunch and en route to NWREL
	2:00-5:30	Visit NWREL
	5:30	Depart for home

December 13-17, 1976 Materials List*

1. Helping Relationships Exercise and Theory Paper. Adapted from: Pino, René and Ruth Emory. Preparing Educational Training Consultants: Skills Training (PETC-I). Portland: Northwest Regional Educational Laboratory, 1976.

2. Convening and Observing Meetings Exercise. Adapted from PETC-I.

3. Matching Needs and R&D Outcomes Exercise. Designed for this session by Dick Arends.

4. Reading Materials:

   Arends, Richard and Jane Arends. "First Time Out: Case Studies of Neophyte Consultants." From: Pino, René and Ruth Emory. Preparing Educational Training Consultants: Organizational Development (PETC-III): Participants Materials. Portland: Northwest Regional Educational Laboratory, 1977.

   Crandall, David. "Needed Perspectives on Linking Agent Training and Support." Linking Processes in Educational Improvement: Concepts and Applications. Columbus: University Council for Educational Administration, 1977.

   Fox, Robert S., et al. Diagnosing the Professional Climate of Schools. Fairfax: N.T.L. Learning Resources Corporation, 1973. Chapters 1 and 2.

   Havelock, Ronald G. The Change Agent's Guide to Innovation in Education. Englewood Cliffs: Educational Technology Publications.

   Runkel, Philip J., et al. "The Delphi Method," in The Second Handbook of Organizational Development in Schools. Palo Alto: Mayfield Publishing Company, 1977, pp. 174-175.

   Sarason, Seymour. The Culture of the School and the Problems of Change. Chapters 1, 8 and 13.

   Shepard. "Rules of Thumb for Change Agents" from PETC-I.

5. Northwest Reading Consortium Management Information System Materials.

6. Associations to Conflict Exercise. Adapted from: Groth, Gretchen A., John E. Lohman, Jean W. Butman and Gary J. Milczarek. Social Conflict and Negotiative Problem Solving. Portland: Northwest Regional Educational Laboratory, (unpublished).

*In this and the materials listings on the following pages, the complete reference appears the first time a publication is cited. In subsequent citations only the title is listed.

7. Yota I and Yota II Exercises. Adapted from Social Conflict and Negotiative Problem Solving.

8. Force Field Analysis Exercises; Problem Statement Materials. From: Jung, Charles, René F. Pino and Ruth Emory. Research Utilizing Problem Solving. Portland: Northwest Regional Educational Laboratory, 1973.

9. Consensus Decision Making Exercises. Adapted from PETC-I.

10. Northwest Reading Consortium Evaluation Materials.

DESIGN OUTLINE

Northwest Reading Consortium Linker Training
Seattle, Washington
February 8-9, 1977

Tuesday, February 8	8:00-9:30	Self-interest analysis -- Theory paper, individual response, pairs sharing, total group discussion (1)
Wednesday, February 9	8:00-12:00	Assertiveness -- Assertiveness paper, practice and discussion; role play of Step 5 in R2R process using consensus ground rules; debriefing (2, 3)
	12:00-1:00	Lunch
	1:00-3:00	Review of interviewing requirement and procedures, T1 data collection -- Project Evaluator explained requirements and led a role play (4)
	3:00	Break, linkers leave for home
	3:00-5:00	Debriefing with Project Evaluator, Project Director, RDU subcontract director, NIE monitor and NWREL staff

77

February 8-9, 1977 Materials List

1. Self-Interest Theory Paper. Adapted from Social Conflict and Negotiative Problem Solving.
2. Assertiveness. Ibid.
3. Right to Read Step 5 Guidelines; from NRC Project Notebook.
4. Interview Guides and T_1 from NRC Evaluation Materials.

DESIGN OUTLINE

Northwest Reading Consortium Linker Training
Cascade Head, Oregon
June 6-10, 1977

Monday, June 6	3:00-5:30	Describing and reviewing experiences with local schools. Organizational structure concepts. (1, 2, 3)
	6:00-8:00	Dinner
	8:00-9:30	Diagnosis, theory and discussion (2, 3, 4)
Tuesday, June 7	9:00-11:00	Diagnostic activities (4)
	11:00-12:00	Linker session
	12:00-3:00	Lunch and free time
	3:00-6:00	Linker role and organizational power (5, 6)
	6:00-8:00	Dinner
	8:00-9:00	Reading time and individual choice of discussion topic (7)
Wednesday, June 8	9:00-11:30	Situational constraints and problem solving (8, 9)
	11:30-12:30	Linker session
	12:30-2:00	Lunch
	2:00-4:30	Observation exercises. Collaborative problem solving activity and process analysis (10, 11)
	4:30-on	Free evening
Thursday, June 9	9:00-11:00	Personal styles analysis. Relation of style preferences to problem solving alternatives (12, 13)
	11:00-12:30	Linker session
	12:30-3:00	Lunch and free time
	3:00-6:00	Relate styles and alternative strategies to diagnoses made in prior sessions (8, 14)

Thursday, June 9 (continued)		
	6:00-8:00	Dinner
	8:00-11:30	Linker, management debriefing sessions
Friday, June 10	9:00-11:00	Complete use of diagnostic analysis, backhome plans. Unfinished business, planning for next training sessions. Evaluation of workshop (8, 14)
	11:00-1:00	Cleanup, lunch and leavetaking

June 6 - 10, 1977 Materials List

1. Collage Activity. Designed for this event by Butman and Lohman

2. Glaser. "Organization structures," The Government of Associations.

3. Miles, M. "Properties of Schools as Social Systems," Change in School Systems (G. Watson, ed.). Chicago: Cooperative Project for Educational Development, National Training Laboratories, National Education Association, 1967.

4. Diagnostic Activity. Application Design

5. Basic Concepts of Power - Theory Paper. Adapted from Social Conflict and Negotiative Problem Solving.

6. Power Diagnosis Activity. Application Design.

7. Reading Materials

   Lakein, Alan, How to Get Control of Your Life. New York: New American Library, 1974

   Mackenzie, Alec, The Time Trap. New York: American Management Association, 1972.

8. Interpretation and Review Exercises. Designed for this Event by Butman and Lohman.

9. Problem Analysis Activity. Adapted from Research Utilizing Problem Solving.

10. Observation Exercise. From Butman, Jean, "Finding Out and Using What's Going On," RFD Resource Kit for Group Facilitators. Portland: Northwest Regional Educational Laboratory, 1975.

11. Decision Making Activity. Designed for this Session by Butman and Lohman.

12. Personal Styles Questionaire. From Social Conflict and Negotiative Problem Solving.

13. Three Approaches to Problem Solving - Theory Paper. Adapted from Social Conflict and Negotiative Problem Solving.

14. Application Exercises. Designed for this Event by Butman and Lohman.

DESIGN OUTLINE

Northwest Reading Consortium Linker Training
Moscow, Idaho
September 15-16, 1977

Thursday, September 15	8:30-12:30	Review and diagnosis of second wave sites and entry processes (1)
	12:30-2:00	Lunch
	2:00-5:30	Implementation issues (2)
	6:00-on	Dinner with former linkers, celebration of changing roles, new beginnings and continuing relationships
Friday, September 16	8:00-11:00	Implementation issues (continued) Specific problems in working with groups, analysis brainstorming (2, 3, 4)
	11:00-12:00	Linker session
	12:00-1:30	Lunch
	1:30-2:30	Planning next training events and project activities
	2:30-3:30	Project management work

September 15-16, 1977 Materials List

1. Guidelines for Diagnosing Entry Issues. Designed for this session by Butman and Lohman.

2. Implementation Issues Work Form. Designed for this session by Butman and Lohman.

3. Problem Statement and Brainstorming Exercises. Adapted from Research Utilizing Problem Solving and from Pfeiffer, J. William and John E. Jones (eds.). A Handbook of Structured Experiences for Human Relations Training. Iowa City: University Associates, 1974.

DESIGN OUTLINE

Northwest Reading Consortium Linker Training
Olympic Washington
October 24, 1977

Monday, October 24	8:30-10:00	Individual problem statement and pair sharing (1)
	10:00-12:00	Round robin, problem analysis and solution brainstorming (2)
	12:00-1:30	Lunch
	1:30-3:00	Group growth and functions (3, 4, 5, 6, 7, 8)
	3:00-4:00	Review of end of meeting, evaluate forms and their uses

October 24, 1977 Materials List

1. Problem Statement and Analysis Forms. Adapted from Research Utilizing Problem Solving. Ibid.

2. Round Robin Exercises. Designed for this session by Butman and Lohman.

3. Some Characteristic Behaviors Found in Productive Groups. Adapted from Guide for Anchored Trainer Ratings.

4. Observation Guide to Group Process. From PETC-I.

5. What To Observe in a Group. From PETC-I.

6. Task Maintenance Roles. From PETC-I.

7. Participant Rating of a Group. From PETC-I.

8. Member Differences--Styles of Emotional Participation. From NTL Handbook, 1960.

DESIGN OUTLINE

Northwest Reading Consortium Training Session
Seattle/Lake Wilderness, Washington
January 18-20, 1978

Wednesday, January 18	9:00-11:00	Orient and develop working relationships between Northwest Reading Consortium project personnel and invited guests
		Group task exercise (4)
		Debriefing and discussion of application to backhome
	11:00-12:00	Overview of afternoon work, introduction to Research Summaries. Individual reading time (2)
	12:00 1:00	Lunch
	1:00-1:30	Continued individual preparation (2)
		Review and application of Research Based materials (2,3,4)
		Group 1: Implications of Research for Needs Assessment
		Group 2: Implications of Research for Selection Criteria
		Group 3: Implications of Research for review of knowledge base program materials
	1:30-3:00	Group task work and preparation of report
	3:00-5:30	Group reports and discussion of utilization of research findings in R2R process steps
	5:30-on	Dinner and arrival at Lake Wilderness

Thursday, January 19	7:30-8:30	Breakfast
	8:30-8:45	Agenda review
	8:45-12:00	Implementation - issues and approaches (5,6)
		- Focus issues review
		- Small group work
		- Group reports, debrief and discuss
	12:00-2:30	Lunch and free time
	2:30-6:15	Linker/ non-linker problem solving and support activities
		Independent meetings with group generated agenda and discussions
	6:30-on	Dinner and free evening
Friday, January 20	7:30-8:30	Breakfast
	8:30-9:30	Complete unfinished business from yesterday
	9:30-11:00	Discussion - professional development, training, socialization and support system for linkers
	11:00-12:00	What kinds of "knowledge" do linkers need?
		Small group work and debriefing discussion
	12:00-1:00	Lunch
	1:00-2:00	Closing activities

January 18-20, 1978 Materials List

1. Poem Exercise. From Handbook for Group Facilitators. University Associates, 1977

2. Research Summaries:
   Synthesis of Research in Basic Skills, Doris Gow, University of Pittsburgh
   Research Within Reach, CEMREL, Inc.
   Research Summaries, Dr. Ruth Waugh, University of Oregon
   The Cognitive Development of Young Children, NIE
   The Social Development of Young Children, NIE

3. Program Materials;

   Matteson Four Dimensional Reading Project
   Project Success - Handicapped
   Project Success - Enrichment
   Systematic Approach to Reading Improvement (SARI)
   U-SAIL
   P.K. Yonge - Individualized Reading Laboratory
   Wisconsin Design - Study Skills
   Title I - Corrective Reading

4. R_2R Handbook Guides for needs assessment and criteria of excellence, from Oregon, Washington, Idaho and Alaska

5. Implementation Issues List. Designed for this session by Butman and Lohman.

6. "Some Basic Factors Which Should Be Considered in Preparing Implementation Plans," from NRC Project materials